

Customer Success



There are five key stages in the lifecycle of a customer. Each one plays an important part in the ongoing success of the customer, and more importantly, the ongoing success of your business. If you can manage each of the four stages correctly, you will reduce churn and increase revenue from your customers.



- **Prospect**--use data about prospect interaction with products and categories on your site to shape their first experience as a customer and validate their buying decision
- **On-Boarding**--provide customers with an on-boarding experience tailored to their goals and needs by driving them towards elements that will make them most successful
- **Educate and Support**--make customers aware of any new features or product enhancements and provide support when and where they need it in your application
- **Up Sell and Cross Sell**--find potential up-sell and cross-sell opportunities based on customer behavior in your application
- **Churn Reduction**--manage renewal opportunities and isolate any customers who are showing signs of potential attrition

Evergage can help you make each of the stages more impactful based on the actions or inactions of the customer and improve your revenue stream. Using Evergage to track and monitor customer activity across your product gives you insight into where they are in the lifecycle. You can get ahead of potential issues and deliver a personalized experience tailored to each customer's needs every time they are using your product.



How to use these articles

The following articles offer best practices for using Evergage to optimize the experience for your customers and reduce churn

Lifecycle Stage	Qualification Criteria	Strategy	Playbook ID/Name
Prospect	Anonymous user	Various	See Demand Generation playbooks page for more information
On-Boarding	Newly logged in customer	Create excellent first-time experience	220 - In-trial – prospect on-boarding
			238 - Introduce helpful tips to drive customer success
Education	New and existing customers	Increase product usage and feature awareness	166 - Display maintenance/outage message
			155 - Communicate new product launch
			164 - Call-out new product Features
			167 - Collect Net Promote Score (NPS) feedback (monitor, engage, learn)
			104 - Add survey and show relevant content to answers
			303 - Promote Features with Evergage for Email
Cross-sell and Up-sell	Existing customers using the product	Drive revenue and customer satisfaction	230 - In-app message customers who have been sent an email offer (with the same offer)
Support	Customers looking for additional guidance	Provide the right information at the right time	223 - In trial – offer additional support
		Reduce overall support costs	165 - Reduce support calls
Churn Reduction	Customers in renewal cycle	Identify potential churn indicators and take action	227 - Churn reduction – remove access to features
			247 - Use callouts to promote unused features